

# Robert (Bo) H. Harris, II

PARTNER

Bo Harris is a partner in MendenFreiman's estate planning and trust, estate administration and business practice areas. He joined the firm in 2018 and specializes in tax planning for individuals and business entities and provides clients with advanced strategies in estate planning. Bo routinely assists clients with the formation of wills and trusts, estate and trust administration, asset protection planning, probate matters, business formation and transactions, business succession planning, and nonprofit formation and planning. He previously practiced with Ingwerson & Taylor and Christian & Small LLP.

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"My focus is building a close relationship with each client so I can fully understand their unique circumstances in order to help them achieve their immediate goals and long term objectives."

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## EDUCATION

- University of Miami School of Law, LL.M., Taxation, 2007
- Cumberland School of Law at Samford University, J.D., 2006
- Birmingham-Southern College, B.S., Biological Chemistry, cum laude, 2003

## BAR ADMISSIONS

- Georgia
- Tennessee
- Alabama

## REPRESENTATIVE MATTERS

- Assisted a client in implementing a gifting strategy using a family limited partnership and dynasty trust that resulted in estate and income tax savings of over eight figures and will provide for the future generations of the family without being subject to estate taxes.
- Prepared and negotiated an agreement while representing the seller of a multimillion-dollar stock sale of a local manufacturing company.
- Counseled beneficiaries of a trust on tax issues related to a lawsuit against a corporate fiduciary which resulted in a seven-figure settlement.

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### Contact Information

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### Legal Assistant

LORA B. HANKS  
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770 559 5590

## PROFESSIONAL AFFILIATIONS AND MEMBERSHIPS

- State Bar of Georgia, member
- Tennessee State Bar, member
- Alabama State Bar, member
- American Bar Association, member

## AWARDS AND RECOGNITION

- Super Lawyers Rising Stars – 2020
- Best Lawyers “Ones to Watch” – 2023

**Super Lawyers**

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